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From the Field

Field Report on the Friendly COUNTER Guides

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Abstract

Since 2003, libraries and publishers have been working with and using COUNTER usage statistics as a core metrics. However, both the producers and users of COUNTER usage reports described difficulty in understanding and interpreting the Code of Practice, which sets out the standard for recording and reporting usage of electronic resources. This issue led COUNTER to collaborate with many partners around the world to produce *Friendly Guides*. These are non-intimidating manuals which explain terminology, the purpose of the usage reports and provide tips how on how to use COUNTER data. This paper explains how collaboration has been essential in meeting the challenges of producing the *Friendly Guides* in multiple languages.

Keywords: COUNTER, usage statistics, guides, Code of Practice

Project COUNTER (colloquially referred to as COUNTER) is a non-profit membership organization supported by a global community of library, publisher, and vendor members, who contribute to the development of the Code of Practice through working groups and outreach. The Code of Practice is a standard designed to count the usage of electronic resources in a library setting. Content providers comply with the Code of Practice in order to give their customers consistent, credible, and comparable usage data. For librarians, COUNTER reports provide important information for analyzing return on investment and informing collection management and building decisions.

The Situation in 2015

The current Code of Practice is a technical document of twenty-nine pages with fifteen appendices one of which is an eight-page glossary of terms. It is not an easy read for the less technical users of COUNTER usage reports and an intimidating read for anyone who is new to the field.

In August 2015, we asked our stakeholders, both content providers and librarians, to tell us how we could improve our service to them. We opened an online survey and received responses from librarians, publishers, and vendors from over thirty countries.

Much of the feedback concerned the complexity of the Code of Practice, and the need for a document which would explain the COUNTER reports and metrics in layperson's terms. Other important feedback from the survey was about consistency. One respondent to the survey summed it by saying, "Vendors do not interpret the standards or implement COUNTER consistently. Obviously, consistency is the key to standards." Another said, "Standardise between the different vendors, so that accurate cross-comparisons can be made." A third requested, "Put your energy and resources into vendor COUNTER compliance." These and other comments made clear that COUNTER must ensure that all content providers can understand the



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Code of Practice properly if they are to implement it correctly and consistently.

Another strand of feedback was about the need for COUNTER to communicate in other languages. One respondent made this point very clearly, “Use different languages, not only English!” Another wrote, “Explications en français.”

The Task

Our market research had identified that we needed to provide guidance about the Code of Practice in language that is more user-friendly. Not only that, we needed to provide such guidance in other languages in order to meet the needs of users around the world.

Our challenge was, and continues to be, how to finance this work. COUNTER is a tiny not-for-profit organization without the funds to hire technical writers, translators, editors, and designers. Collaboration would have to be the answer. Indeed, COUNTER was an early example of the scholarly communications community coming together to create and maintain an industry-wide standard, so we would follow in that time-honored tradition to meet our members’ needs.

The Actions

Our first stroke of luck was an offer from Tasha Mellins-Cohen to write a guidance document for content providers. Tasha’s employer at the time was Semantico, which agreed that she could use some of her time on this project. Tasha has a great deal of experience and a talent in translating technical requirements into language that non-technical people can understand. In our planning meeting to discuss what form the guidance document would take, we agreed the objective was to create non-intimidating and user-friendly guides, and thus our series of *Friendly Guides* was born. Tasha authored our first two guides: the *Friendly Guide to COUNTER* and the *Friendly (Technical) Guide to COUNTER*.

The first of these explains the basic concepts to content providers, such as what COUNTER is and how to become COUNTER-compliant. The guide explains the purpose of the various COUNTER reports, what is included and what is excluded from each report, what reports should look like, and what they mean. This guide is not just useful for technical staff members involved in implementing COUNTER, but also sales, marketing, and editorial staff who may use the reports. The second publication, *The Friendly (Technical) Guide to COUNTER* explains about the auditing process. This is an important feature of the Code of Practice ensuring compliant vendors must be independently audited on a regular basis in order to maintain their COUNTER-compliant status. The guide also explains how to track usage, process usage data, and how to eliminate the double-clicks or robotic use that would otherwise inflate usage statistics. It also explains how to deliver COUNTER reports and how to implement the protocol that enables libraries to automate the collection of usage statistics.

Although we had an expert author who could give her time for free, we still faced the challenge of financing the editorial review and design. The Association of American Publishers (AAP) came to our rescue by sponsoring the production of the guides.

By the autumn of 2015, we had our author and funding for the first of our *Friendly Guides* aimed at content providers. However, we realized that librarians needed a different type of guide, which would explain not only about the reports and technical terms, but also how to use COUNTER reports to inform decision-making. We were fortunate to find another willing and expert author. Mitchell Dunkley works in the Content Delivery Team at De Montfort University Library, managing the Library’s e-resources portfolio and is involved in library systems administration, collating resource usage statistics,



and troubleshooting. Mitchell also writes a very readable blog <http://mitchley.our.dmu.ac.uk/>. In our discussion about guides for librarians, we agreed that three were required, one for each of the three main categories of COUNTER reports: database reports, journal reports, and book reports. In these guides, Mitchell provides tips for using COUNTER data. For example, how to add cost data to calculate cost-per-use and how visualization of the data in the forms of graphs and charts can help librarians to spot and interpret resource usage and cost trends more easily. Again, we faced the problem of financing the editorial and production processes, but the Institution of Engineering and Technology (IET) solved this issue for us by becoming the sponsor of the *Friendly Guides for Librarians*.

By March 2016, our collaboration with Tasha and Mitchell and our sponsorship from AAP and IET resulted in the publication in the English language version of five *Friendly Guides*. A couple of months later, we moved our website and for a few days the *Friendly Guides* were unavailable. Our inbox was on fire with complaints, and we hastily got the guides back online, but it was gratifying to know they were in such demand. However, there was no time to relax. Our survey results had revealed that we had to communicate in other languages. A way forward was to collaborate with COUNTER members in other countries; members who understand usage reports, who are fluent in English, and can translate content into their first language. As a result, we were fortunate indeed to work with Yanick Beaudoin, from the Canadian Research Knowledge Network (CRNK), who translated the *Friendly Library Guides* into French. We also worked with Milan Vasiljevic, from the Qatar National Library, who translated the *Friendly Guide to COUNTER* into Arabic. The Couperin.org team in France, led by Thomas Jouneau, who heroically translated both the *Friendly Guide* and *Friendly (Technical) Guide* into

French, and Luís Gustavo S. Gomes, from SciELO, who bravely translated the *Friendly (Technical) Guide* into both Spanish and Portuguese.

Further sponsorship from IET was essential in enabling us to employ professional translators, so we could produce *Friendly Library Guides* in Arabic, Portuguese, and Spanish by the end of 2016 and in Chinese by March 2017.

Having produced the guides, it was important to ensure that people were aware of their existence and where to find them. Again, our collaborators helped with the dissemination. CRNK, SciELO, Qatar National Library, and Couperin.org all promoted the guides that they translated through their websites and local networks. Our sponsor AAP made the guides available from its website. We were also grateful for the help of CNKI, which publishes the China Academic Journals full-text database, who offered to help distribute the Chinese language *Friendly Guides for Librarians* to their customers in China.

However, we cannot rest on our laurels. Last year we published Release 5 of the COUNTER Code of Practice which will become effective from January 2019. The new release is internally consistent, unambiguous, and flexible, but nonetheless it is a technical document, and thus guides are required so that everyone readily understands it. The Release 5 document is even longer than the previous release at seventy-eight pages, plus nine appendices. Tasha Mellins-Cohen has once again contributed her time, and is the author of three more guides: *The Friendly Guide to Release 5 for Content Providers*, [Friendly Guide to Release 5 Technical Notes for Providers](#), and *The Friendly Guide to Release 5 for Librarians*. The Royal Society of Chemistry has sponsored the production of these library guides. Our next phase of activity will be to translate these Release 5 guides into other languages. We are delighted to report that Couperin.org in France is already working on French language editions.

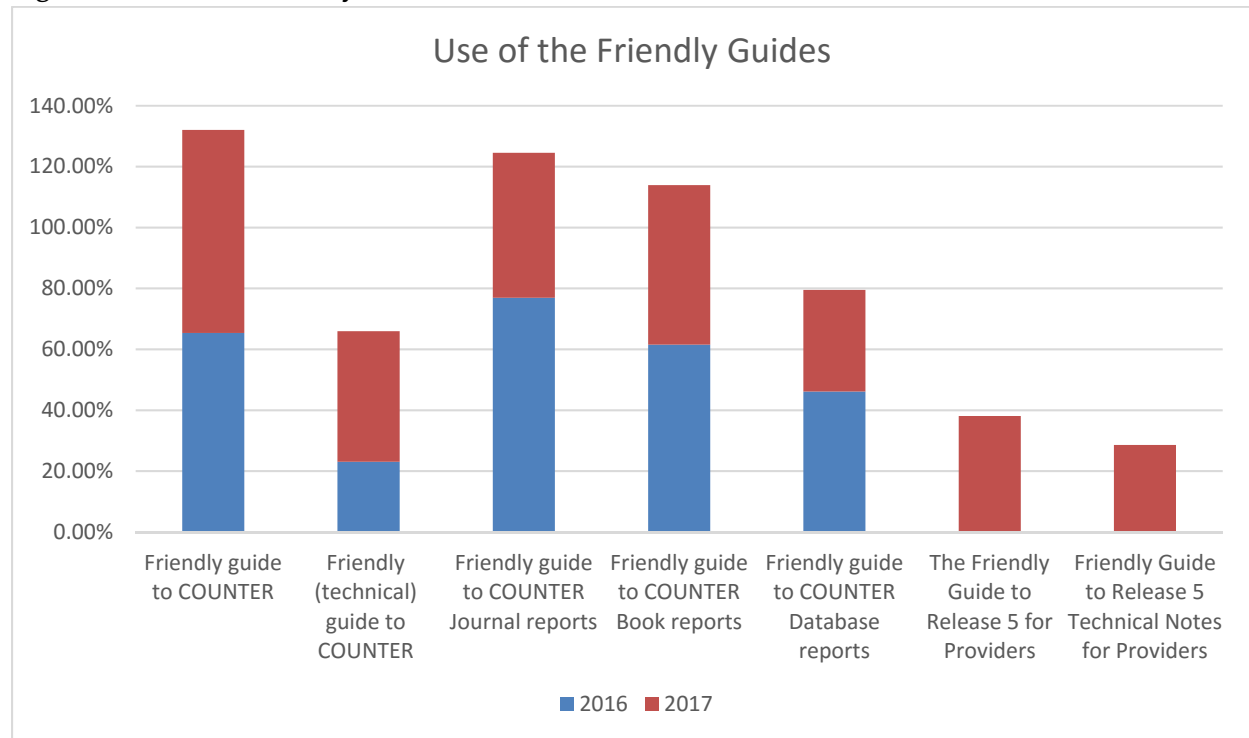


The Results

We have measured stakeholders' satisfaction with the guides. In our 2016 and 2017 COUN-

TER satisfaction surveys we asked the respondents if they had used the guides. The response was as follows in Figure 1.

Figure 1. Use of the Friendly Guides in 2016 and 2017



When asked to rate on a scale of 0-100 how useful they had found the guides, the average rating from respondents is 77% in 2016 and 75% in 2017. Free field feedback was also positive. For example, one respondent said, "I found the new format is very helpful and easy to follow. Each section provides detailed information with understandable language and examples." However, there were some complaints that the guides are not easy enough to find on the COUNTER website. In response to our 2017 survey, open when only the *Release 5 Guide for Content Providers* was available, one librarian said firmly, "Create Release 5 *Friendly Guides for Libraries* as well."

The Situation in 2018

Of course, our guides are just one channel for communication and we have learned our lesson about the need to communicate languages other than English. In 2018, we will be running webinars about the Release 5 Code of Practice. We are collaborating with our executive committee members to deliver these in as many languages (and time zones) as possible. Irene Barbers, Head of Licence Management at the Central Library of Forschungszentrum Juelich, and Bernd Oberknapp, the Head of ReDI, the service department for the Baden-Württemberg federal state library consortium, will deliver webinars in the German language. Thomas Jouneau, librarian at the Université de Lorraine, and Thomas Porquet, a project manager at Couperin.org, will



deliver webinars in the French language. Jill Emery, the Collection Development and Management Librarian at Portland State University, and Marie Kennedy, Librarian at Loyola Marymount University, will deliver webinars in the English language.

We remain willing and eager to collaborate with COUNTER members around the world in producing translations of our guides and in delivering webinars.

Our lessons learned are first to listen and respond to the needs of your stakeholders. Second, if you cannot meet their needs due to financial restriction, in the words of Seamus Heaney “walk on air against your better judgment.” Initially, we were somewhat reticent about asking for time and money. However, now my advice is to go out and seek collaboration, ask organizations to donate sponsorship, and experts to donate their time. Our *Friendly Guides* are testament to the goodwill that can be found across the library and scholarly communication communities. Our members contributed time, expertise, and funding, which helped us meet the needs we identified through our survey. We are deeply grateful for their support.

